HANDOUT: 3.2 — FACILITATION CHECKLIST

Here is a series of questions you should ask if you have been requested to facilitate a meeting. These questions can be used as a guide for clarifying the purpose and details for an upcoming meeting. You can also use this checklist whether you are the organizer of the meeting or if you are working with a facilitator to guide the meeting.

GENERAL QUESTIONS

1. Who is organizing the meeting? Is the same person who is organizing the meeting also chairing the meeting?

- 2. What is the purpose of the meeting?
- 3. What do the organizers want as a result or outcome of the meeting?
- 4. What is the history of the situation, or topic, for convening the meeting?
- 5. What is the expected size of the group that will participate or attend the meeting?
- 6. Who will be affected by decisions made by the people at the meeting?
- 7. Are there any underlying situations or problems that I, as facilitator, need to be aware of? (Will any of these issues be highly contentious or difficult for participants?)
- 8. What is the timeframe for preparing and conducting the meeting? (If there will be a series of meetings to address an issue, what is the timeframe for the entire process – from start to finish? And what are the desired intervals and dates of the meetings?)
- 9. Is there clarity about my responsibilities as facilitator, (e.g., process design, preparation of agenda, meeting facilitation, meeting summary, etc.)? What are the limitations or boundaries of my authority over the meeting?
- 10. Is there clarity about the responsibilities of other people involved with the meeting?
 Who will be responsible for meeting logistics, communication, background materials, and notes?
- 11. Will the participants be asked to evaluate the meeting, to assess its success in achieving stated outcome(s) or objective(s) of the meeting? Will the participants be asked to evaluate the facilitator's performance?
- 12. Ultimately, what criteria will determine if the meeting is successful in achieving the meeting's stated goals(s) and objective(s) or if the meeting is successful (in other ways)?
- 13. Is there any other important information I, as facilitator, should know about the meeting, the issues to be addressed, or the expected outcome(s) of the meeting?

LOGISTICS

As a facilitator, you need to know who is responsible for the meeting's logisitcal arrangement and confirm that all

necessary arrangements have been made.

Here is a matrix of points to consider.

MEETING OBJECTIVE

Participants

- 1. Who is most affected?
- 2. Who benefits most?
- Who is responsible for inviting participants (e.g., creating the list, sending invitations, response mechanism)
- 4. What is the make-up of the participants (e.g., community leaders, government officials, other stakeholders)

Selection of Venue

- 1. The venue should be central and accessible.
- 2. Ensure seating is adequate and comfortable.
- 3. Ensure room is well-lit and ventilated.
- 4. Ensure adequate restrooms are available.
- 5. Avoid noise pollution.
- 6. Ensure that the room has sufficient electrical outlets/power sources.

Selection of Presentation Tools

- Ensure adequate
 microphones (e.g., a
 lapel microphone for the
 facilitator and the
 speaker(s), a wireless
 microphone(s) for
 question and answer
 sessions, a podium
 microphone)
- Confirm other necessary audio/visual equipment (e.g., video, recording equipment, LCD slide projector, overhead projector, etc.)
- Confirm other supplies (e.g., posters, brochures, markers, flip charts/easels, white board, etc.)

Sources

Hinkey, L. and Engleby, L. (instructors/editors). 2002. Navigating in Rough Seas: Public Policy Issues and Conflict Management. NOAA Coastal Services Center. 51 p.

Gardner, L. 2003. 51 p. UNEP-CEP: Training of Trainers in Marine Protected Areas Management. 1-11 p.